

**Vermont Secretary of State  
Office of Professional Regulation  
BOARD OF ACCOUNTANCY  
Location: 89 Main Street, 3<sup>rd</sup> Floor, Montpelier, VT 05602**

**Approved Minutes**

**April 20, 2015**

**Members present:** Joshua Partlow, Thomas Shortle, Steve Love, and John Borch

**Absent Member(s):** Danny Coane

**Staff present:** Aprille Morrison, Gabriel Gilman and Peter Comart

1. 9:08 a.m. Called to order
2. **Approval of the Minutes of the January 27, 2015 meeting.** Mr. Love made a motion to approve the minutes as presented. Mr. Borch seconded the motion. Motion passed.
3. **Reports/Follow-up cases.** Case Managers Report by Carla Preston  

Ms. Preston informed the Board they currently have twenty (20) cases. Seventeen (17) are set for Investigative Team meeting, two (2) are set for hearing (one being heard as a stipulation and consent order at today's meeting) and one (1) is pending charges being filed.
4. **Hearings/Stipulations/Concluded Investigations:**  

Stipulation and Consent Order: William Burnett, docket # 2013-761. Mr. Shortle made a motion to accept the order as presented. Mr. Love seconded the motion. Motion passed. Mr. Borch did not participate in the hearing as he was the Investigative Team member.
5. **Correspondence/Discussion items**
  - a. **Regional New England Peer Review Oversight Committee (PROC).** Dan Dustin with NASBA contacted Mr. Partlow to see if Vermont would be interested in participating in a peer review oversight committee comprised of the New England States. Mr. Partlow, after checking with the Board members, informed Mr. Dustin of Vermont's interest. Mr. Partlow will wait to hear back from Mr. Dustin.
  - b. **NASBA Focus Questions.** Mr. Partlow had received questions about Board procedures and practice from NASBA. Mr. Partlow forwarded his responses to members and then forwarded the finished answers back to NASBA on April 1<sup>st</sup>.
  - c. **College Programs – CPA review courses.** This was an information item presented to the Board to keep everyone informed about the new courses colleges are offering for CPA candidates.
  - d. **Vermont Society of CPA's Annual Meeting.** Mr. Partlow was contacted by the Vermont Society of CPA's regarding their annual meeting to be held at the Hilton in Burlington on May 7<sup>th</sup>. The society has requested a representative of the Board to give members present a brief update on Board activities. The representative is scheduled from 1:50 pm to 2:05 pm, Mr. Partlow will attend as he is in the area, however if another member wishes to give the updates they may let him know in advance of the meeting.

**6. Licensing – Review the following applications for licensure**

Mr. Shortle made a motion to approve the following applicants for licensure. Mr. Borch seconded the motion. Motion passed.

Hea Mee Kwon

John E. Libby, CPA PLLC

Mr. Shortle made a motion to approve the following applications pending Ms. Morrison's verification of attendance with University of Texas at Dallas, and Brookhaven University where applicable. Mr. Love seconded the motion. Motion passed.

Xiaoqian Ma  
Liang Zhao

Jongbin Kuang  
Xi Chen

Yi-Chun Tsai

Si Meng

The Board requested Ms. Morrison follow up with the following applications:

Lei Liu

Lakshminarayana Bhaskar

I-Chung Lin

**7. Other Board Business**

George Belcher, the Administrative Law Officer for the Office of Professional Regulation, attended the Board meeting briefly and introduced himself to the Board members present.

Mr. Borch informed members present that registration is now open for the Regional meeting in Baltimore, MD from June 24-26<sup>th</sup>. A representative will be chosen at the May meeting.

Mr. Love suggested the Board review the Broker/Dealer audits that are done for Vermont entities. Mr. Love will see if he can find a list to review.

Ms. Morrison brought in a request for information from NASBA to release examination information to Kansas State University. The Board gave their approval.

**8. Adjourn.** With there being no additional business to attend to the meeting adjourned at 11:00 am.

**Next Meeting: May 26, 2015**